

Medicaid Eligibility Handbook
Worksheet Section

Family Care Eligibility - Non-MA Financial Determination

Applicant Name (Last, First, MI)			Spouse's Name (Last, First, MI)	
Address (Street, City, State, Zip)				
Applicant Social Security Number	Applicant Telephone Number	Resource Center Worker Name	ES Worker Name	

Part 1 - Asset Determination (MAHB 32.5.2.1)

1. Enter total countable assets: If applicant is married, count assets of both. Do not include Independence Accounts.	Applicant \$	Spouse \$	Joint \$	\$
2. Community Spouse Asset Share (MAHB 23.4.2) Enter \$0 if there is no community spouse.				\$
3. Subtract Line 2 from Line 1. Enter amount on Line 3.				\$
4. Subtract from line 3 the following allowances: a. The Basic Asset Allowance (MAHB 30.12.0) if applicant lives in NH, CBRF, or AFH or b. The Basic Asset Allowance (MAHB 30.12.0) if applicant lives in private residence, RCAC or other community setting.				\$
5. Equals total countable assets of applicant.				\$
6. Divide Line 5 by 12.				-- 12
7. Equals Family Care monthly net countable assets of applicant.				\$

Part 2 - Income Determination (32.5.2.2)

8. Enter monthly earned income of applicant.	\$
9. Add Workers Compensation.	\$
10. Add Unemployment Compensation.	\$
11. Equals countable monthly earned income.	\$
12. Subtract \$200 (earned income disregard).	- \$200
13. Equals.	\$
14. Multiply Line 13 by 2/3 (earned income disregard) enter amount. Subtract this amount from line 13 and place remainder on line 15.	\$
15. Equals Family Care total countable monthly earned income.	\$
16. Enter Family Care applicant's unearned Income. Do not include unemployment compensation, workers compensation, or any interest from Independence Accounts.	\$
17. Add line 15 (earned income) and line 16 (unearned income). Enter sum on Line 17.	\$
18. Subtract \$20 Standard Income deduction.	- \$20
19. Equals net monthly countable income.	\$
20. Add Line 7 (net countable monthly assets).	\$
21. Equals total countable monthly resources.	\$

PART 3 - Cost Share Determination (MAHB 32.5.2.3)

22. Enter total countable monthly resources from Line 21.	\$
23. Enter Community Spouse income allocation (MAHB 23.6.0).	\$
24. Enter any court ordered payments (MAHB 15.3.2).	\$
25. Enter: a. If applicant resides in a NH, Adult Family Home, or CBRF, the Basic Needs Allowance (MAHB 30.12.0) or b. If the applicant resides in private residence, RCAC or other community setting the greater of: <ul style="list-style-type: none"> The SSI Payment Level Plus the E Supplement (MAHB 30.5.0) for one person. Actual maintenance costs up to EBD Maximum Personal Maintenance Allowance (MAHB 30.5.1) *See Part 4 below. 	\$
26. If the applicant residing in a nursing home is expected to return to his/her home within six months, and incurs costs for maintaining a residence, enter a home maintenance allowance up to the SSI Payment Level Plus the E Supplement for one person (MAHB 15.3.1, 30.5.0). (Includes rent, mortgage, taxes, insurance, condo fee, and actual utility costs.)	\$
27. Enter out of pocket medical/remedial expenses (MAHB 15.3.5).	\$
28. Enter any dependent family member allowance (MAHB 23.6.0).	\$
29. Add health insurance premiums paid (MAHB 25.9.2.3).	\$
30. Add Lines 23-29 and enter total dollar amount.	\$
31. Subtract line 30 from Line 22. This is the COST SHARE amount. Line 31 may not be greater than the: a. Projected comprehensive care plan cost in MAHB 30.12.0. b. Projected intermediate care plan cost in MAHB 30.12.0. c. Actual cost of care plan.	\$

* Part 4 - Actual Maintenance Costs Calculation

1. Enter applicant's shelter costs.	\$																
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="4" style="padding: 5px;">Shelter Costs include:</td> </tr> <tr> <td style="width: 30%; padding: 5px;"> <ul style="list-style-type: none"> Rent Mortgage Taxes Insurance Condo fee Standard Utility Allowance (may not exceed \$203) TOTAL SHELTER COSTS (Enter on Line 1 of Part 4.) </td> <td style="width: 10%; padding: 5px; text-align: center;">\$</td> <td style="width: 30%; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="padding: 5px;">Standard Utility Allowance 2001</td> </tr> <tr> <td style="padding: 5px;">Heat & Utilities</td> <td style="padding: 5px; text-align: right;">\$211</td> </tr> <tr> <td style="padding: 5px;">Utilities Only</td> <td style="padding: 5px; text-align: right;">\$125</td> </tr> <tr> <td style="padding: 5px;">Telephone Only</td> <td style="padding: 5px; text-align: right;">\$25</td> </tr> </table> </td> <td style="width: 30%;"></td> </tr> </table>	Shelter Costs include:				<ul style="list-style-type: none"> Rent Mortgage Taxes Insurance Condo fee Standard Utility Allowance (may not exceed \$203) TOTAL SHELTER COSTS (Enter on Line 1 of Part 4.) 	\$	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="padding: 5px;">Standard Utility Allowance 2001</td> </tr> <tr> <td style="padding: 5px;">Heat & Utilities</td> <td style="padding: 5px; text-align: right;">\$211</td> </tr> <tr> <td style="padding: 5px;">Utilities Only</td> <td style="padding: 5px; text-align: right;">\$125</td> </tr> <tr> <td style="padding: 5px;">Telephone Only</td> <td style="padding: 5px; text-align: right;">\$25</td> </tr> </table>	Standard Utility Allowance 2001		Heat & Utilities	\$211	Utilities Only	\$125	Telephone Only	\$25		\$
Shelter Costs include:																	
<ul style="list-style-type: none"> Rent Mortgage Taxes Insurance Condo fee Standard Utility Allowance (may not exceed \$203) TOTAL SHELTER COSTS (Enter on Line 1 of Part 4.) 	\$	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="padding: 5px;">Standard Utility Allowance 2001</td> </tr> <tr> <td style="padding: 5px;">Heat & Utilities</td> <td style="padding: 5px; text-align: right;">\$211</td> </tr> <tr> <td style="padding: 5px;">Utilities Only</td> <td style="padding: 5px; text-align: right;">\$125</td> </tr> <tr> <td style="padding: 5px;">Telephone Only</td> <td style="padding: 5px; text-align: right;">\$25</td> </tr> </table>	Standard Utility Allowance 2001		Heat & Utilities	\$211	Utilities Only	\$125	Telephone Only	\$25							
Standard Utility Allowance 2001																	
Heat & Utilities	\$211																
Utilities Only	\$125																
Telephone Only	\$25																
2. Add Food Stamp allotment for one person.	\$139																
3. Add standard clothing allowance.	\$100																
4. Equals applicant's actual maintenance costs. Total may not exceed \$1,114 per month.	\$																